REALM™

A methodology for reliable, entrepreneurial, accessible lifestyles.™

What to expect…

Now that we are in the implementation phase of our process, we would like to provide a timeline of what to expect over the next 90 days, the next year and beyond.

First 2 Weeks:

Welcome call. One of our principals will reach out to welcome you to Interdependent Advisors.

Welcome email and updates from your dedicated operations team. This will include contact info for your team members and instructions on how to access your Wealth Portal.

Welcome packet via mail or email. Mail from our broker/dealer, Cambridge Investment Research Inc. and your custodian(s). While we can minimize ongoing mail, some initial and ongoing correspondence are required by mail. Phone interview with insurance company or call to schedule paramedical exam (insurance only).

30 Days:

Monthly newsletter and economic updates. Welcome emails highlighting online access and the services we provide that are critical to a comprehensive plan.

90 Days:

Advisor call. Your lead advisor will reach out to you to clarify anything related to your statements, online access and to tie up any loose ends. Proactive reviews will be performed, whether we meet in person or not, by your lead advisor and team every 90 days. Expect to receive a confirmation email when these reviews have been completed and your advisor will let you know if there are items that need attention.

Ongoing:

Update meetings will be performed face to face or by conference call, at least, annually. This is the opportunity for us to confirm goals and objectives and keep your plan up to date. Quarterly-annually.

Hiccups. We will do everything we can to make this as smooth a process as we can. However, this is a complex, highly regulated business that is ever changing. All these moving parts occasionally will result in new paperwork requirements, data feed issues or vendors not syncing well. As you would expect, our promise is to keep you informed. Your flexibility and understanding as well as your accessibility will help us expedite this process as quickly as possible and overcome any challenges we may come across.

Mail from our broker/dealer, Cambridge Investment Research Inc., and your custodian. While we can minimize ongoing mail, some initial and ongoing correspondence are required by mail.

Conviction in your Strategy. Fear and anxiety are two emotions that may creep into the picture occasionally when we are seeing the markets move sharply in one direction or another. We review economic indicators and asset allocation regularly and make changes consistent with your strategy and objectives. We believe in staying the course and following the plan we have constructed. Remember that the portfolio was built for you, your family, your time horizon, your risk tolerance and your financial plan. It is all about the lifestyle you have worked so hard to achieve now and in the future!